Module 11 Course Outline: tcm 7 Basic using Programs

The course is designed for first-time users of tcm 7 software at organisations that use tcm 7 with the Programs module.

The course presumes participants have had no prior exposure to The Care Manager software (versions 6.11.x or earlier) or tcm 7.

1. Welcome and Introductions

- Participants introduction
- Discussion of course outline
- Venue details, breaks etc

2. Getting help with tcm 7

- Accessing help files from with tcm 7 (Global Menu bar > Help > Contents)
- Downloading documentation and asking questions via the Bulletin Board.

3. Introduction to tcm 7 navigation

The features below are relevant to most Switchboards including Clients, Programs, Groups, Events and Client Contacts

a. Navigation Pane

- Purpose
- Navigation Pane buttons
- Toggling the Navigation Pane on/off

b. Global Menu Bar

An alternative to the Navigation Pane

c. Search Pane

- How to search for clients, Programs, Groups, Events, Client Contacts etc

d. Results Pane

- How to customise (adding columns etc)
- How to print a list
- Saving multiple views

4. Client Episodes and Programs

The Programs module enables the creation of individual programs whereby planning is documented, services planned, costs-recovered and financial reports created on individual Programs.

Each specific Program has its own set of Milestones and Status movements. Programs operate independently of each other, all within the one, single client Episode (i.e. the client only needs to be registered once in the database). Each Program type has its own funding, care manager, cost code, history and diary so that care managers can create documentation and services relating to a client's Program for which they are responsible.

5. Task button bars at the Client and Program Switchboard

Buttons sharing the same functions both at the Client and Program Switchboards

- Refresh
- Preview
- Views

Task Bar at Client Switchboard

- Details: opens the client record
- Add New: adds a new client to the database
- New Event: do not create documentation from the Client Switchboard – create from Programs Switchboard
- View Event: displays the most recent Client Event created in all Programs of the selected client
- History: displays documentation created from all Programs
- Programs: highlight a client and click to go to the Programs for that client
- Diary: displays planned services from all Programs
- Scheduled Events: displays reminders of client events to done in the future

Task Bars at Programs Switchboard

- Details: displays selected Program record
- Add New: adds a new Program for the selected client
- New Event: creates documentation for a selected Program
- View Event: displays most recent select Event created in a Program
- History: displays documentation created from a selected Program
- Diary: click to go to a selected Program Diary

6. Client Switchboard — gateway to Programs

- Basic searching and filtering for a particular client in the Search Pane
- Search and Clear buttons
- Show all Episodes tick box
- Search Pane functions including the "Episode has Program(s)" tick box using Program Type, Team, Status, Fund and Care Manager.
- Using the "Search Programs" tick box to locate those clients with Programs filtered by Care Manager and/or Team, Program Type and Status
- Explanation as to why New Events and Diary buttons are not to be used when using the Programs module.

7. Client Basics — Episodes, Status & Movements

> Episode Status

- Concept of Episodes of care
- How and why The Care Manager tracks client Episode status
- How Episode Status looks after itself when using Programs

> Program Status

- How and why each Program has their own Status (all created within the one overarching Client Episode).
- How to set Program Status (Pending, Standard, Wait-Listed, Active, Completed)

8. New Client button (from the Client Switchboard)

- Exploring the Client Info Record (eight-tabbed client record)
- Explaining auto-complete, drop-down calendars, drop-down lists, free text fields and the “i” button
- Participants to add a new client prior to assigning them to a new Program
- Accessing, editing and printing a client record

9. Client Contacts (created from the Client Switchboard)

A client may have multiple Programs but will only have one set of Contacts (family, friends etc)

- Adding a new contact with explanation of relationships and roles
- Printing a contact record for one client from the Contacts box, or for a selection of clients via the Reports screen.

10. Programs

Introduction to Programs

- Advantages of using Programs with multiple Status events, separate care managers for each Program, separate funding types etc advantages of having separate documentation and diary services

Getting to the Program Switchboard

- – Using a name at the Client Switchboard
  – Clicking on the Programs link in the Navigation pane
  – Using Global Menu bar > Home > Programs
- Searching the Programs Switchboard
- Printing a list of Programs

11. Creating a new Program

- Participants to create a new Program for the newly added client.
- Program Status Events: accepting and activating
- Placing a program on Hold
- Completing a Program

12. Programs documentation

Created via New Event button on the Programs Switchboard. Your organisation may not necessarily use the entire range of client Events below. Not every Client Event is covered in Basic using Programs. Events marked with an asterisk are those generally covered.

- Program Status Event *
- SCTT 2006
- HACC MDS
- Care Plan *
- Note *
- Note with Alert *
- CSTDA
- Referral (To/Outgoing and From/Incoming) *
- Emergency Plan *
- Medication List
- Diagnosis Lists
- Client Incident
- CIARR form
- Correspondence using Microsoft Word (overview) *
- Safety Issue*
- Attached Document
- Individual Program Plans
- Consent Event
- Court Order

13. Options available in some Client Events

- Spell Checker
- Revoking of records that cannot be edited or deleted (i.e. Notes, Safety Issues, Emergency Plans, Client Incidents, Medication Lists, Diagnosis Lists)
- Updating a Care Note
- Recording care management time in a Note
- Setting and clearing Alerts (Alerts can be activated on Notes, Incidents, Emergency Plans, Diagnosis List, Medication List and Safety Issues).
- Linking external documents in Notes, Care Plans, Referrals, Incidents and Safety Issues.

14. View Event button (one-at-a-time only)

- Displays the newest (most recent) Event of a selected type.

15. Program History screen (view all Events)

View all documentation created via the New Event button. The Program History screen displays all documentation for a specific Program.

- Navigating the Program History screen
- Various ways to view events (Summary and Details)
- The New Event menu is available from the History screen as well as from the Program Switchboard's task bar.
- Documentation from other Programs for the same client can only be viewed at the Episode level History screen

16. Viewing, editing and printing Client Events

- How to access, view and print client records and other documentation
- Print Previewing
- Emailing and exporting to PDF and other formats

17. Program Diary

- Types of Diaries: Episode Diary Program Diary, Group Diary
- Introduction to the Program Diary
- Navigating the Diary screen
- Navigation pane
- Timeline Ruler
- Previous and Next Appointments
- Different views via task bar
- Viewing planned services for <u>all</u> Programs for the same client at the Client Switchboard's Diary screen.

18. Diary Task bar options

- Refresh
- Preview
- Views
- Group by
- Go to today
- Add new Note
- Service (add, edit, cancel. revise, terminate etc)
- Shift (used in rostering)

19. Open Calendar link

- Opening an Episode, Program or Group Diary (and rosters)
- Adding to the Most recent used list

20. Adding a Calendar Note

Calendar Notes are used to annotate a client's social or other appointments so that services are not scheduled for times the client is not home. A Calendar Note is not related to a funded service.

21. Adding a Planned Service

- Adding a Service (how the Diary records a service, provider and cost allocations)
- Service Delivery tab
- Travel tab
- Provision tab
- Rostering tab
- Cost Recovery tab

22. Revising, terminating, copying and deleting a Planned Services

- Revising a service from a future date
- Cancelling and varying planned services for one day only
- Terminating a service from a future date
- Copying a service

23. Diary background colours

- How coloured backgrounds indicate the type of calendar being viewed

24. Service status colours

- How coloured ribbons on planned service indicate the status of that service (white, yellow, red, blue, green and grey)

25. Reports based on Planned Services

- Reports available from the Diary's task bar > Preview
- Reports available from the Reporting screen (Global menu > Home > Reporting

end of one-day Basic using Programs Course

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